

TV nationalism clouds Sky gains

By LAUREL WENTZ

LONDON—Five years after the launch of Sky Channel, Rupert Murdoch's pan-European satellite TV channel, industry observers are having doubts about whether TV channels aimed at Western Europe are the best way to capture European audiences and ad revenues.

Sky and U.K.-based ITV Co.'s Super Channel, the two entertainment English-language channels beamed across Europe by satellite, are experimenting with Dutch-and-German-language programming to target specific groups.

The main incentive to the growth of pan-European TV have been the severely limited program choices and advertising opportunities on domestic channels controlled in

most of Europe by state broadcasting monopolies. European viewers watch only 2½ hours of TV a day on average compared with 4½ hours daily in the U.S.

But the local TV picture is changing fast. New channels are planned for almost every country in Europe as governments move to preserve cultural values and ad money from an invasion of foreign channels.

In France, this year's start-up of two new channels and the sell-off of one of the three state-owned national channels has changed a deficit of airtime for advertisers to a surplus almost overnight. Seven other countries are planning at least nine new channels by 1990.

A former Sky Channel executive said, "I could see we acted as a catalyst for change [at Sky], and I be-

lieve there will be a vast explosion in European ad expenditures, but I agree the biggest growth will be in national channels."

The next big step in European broadcasting is direct broadcast by high-power satellite, or DBS, to individual home dishes. This will target specific countries or language groups even though the satellites will cover most of Europe.

Europe's first DBS satellite, was launched by West Germany last month, but one of the two power-generating solar panels is jammed. If the engineers are unable to fix it soon, only two of the four channels will be usable. West Germany is also being widely criticized for designing TV-SAT 1 to a transmission standard that West German TV sets cannot pick up without a new part

that is not available.

Next year France and Scandinavia will send up their DBS satellites devoted to French and Scandinavian programming. The U.K. will follow in 1989 with three new channels for British viewers.

Saatchi & Saatchi predicts TV ad spending in Europe will reach \$7.4 billion a year, a 58% increase from \$4.7 billion in 1985. So far the satellite TV channels have managed to capture only \$25 million of that ad spending. Sky, with an estimated \$13 million in ad revenues last year, takes in the biggest slice, but still managed to double its losses to \$10.3 million last year.

"A critical question obviously concerns the extent to which the satellite channels are going to share in this market explosion," said Pa-

trick Cox, who resigned last month as ceo and deputy chairman of Sky Channel. Speaking at a TV conference in Luxembourg the week before he quit, he said, "There seems to be little doubt now about the role of the 'national' channels like [new German-language satellite-delivered] Sat1 and RTL Plus, but questions remain concerning the pan-European channels like Sky, Super and Music Television. The advertising profession is now fully aware of the difficulties involved in developing pan-European campaigns, but the fact remains that the market is there and is growing at over 25% a year."

In addition to the problem of persuading advertisers to use satellite channels, conflicts arise with individual countries over pan-European advertising.

The Finnish government has taken McDonald's Corp. to court

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Rupert Murdoch

over commercials aired on Sky last year for a promotion offering customers a toy plastic boat free with hamburger purchase. The Finns say the spots offered children boats, not hamburgers, and so contravened strict national promotion rules.

The local McDonald's franchisee claims it had no control over the spots, booked through McDonald's U.K. ad agency Leo Burnett Ltd. at Sky's head office in London. (The satellite channel's policy is to take commercials that are acceptable in the country in which the broadcast originates, not necessarily in all the markets the channel airs).

In another dispute, two Dutch advertising groups have taken the Dutch government to an EEC tribunal in Luxembourg over attempts to protect the local advertising market from pan-European satellite TV stations.

The Dutch government won't allow the foreign channels to broadcast spots aimed at the Dutch market which accounts for one-third of Sky and Super Channel's 10 million European cable homes. Despite the huge Dutch audience, spots cannot be dubbed or subtitled in Dutch or advertise products available only in the Netherlands. Two Dutch industry groups support an open market for pan-European TV and are charging the Dutch government with violating the spirit of EEC trade regulations.

Super Channel won permission from the Ministry for Culture to air a popular Dutch sitcom with English subtitles from Nov. 19 by promising not to run any commercials during or around the program. The show, a comedy series called "Say Ah" about a woman doctor and her two children, is Super Channel's first attempt to appeal to a local rather than a pan-European audience. A company spokeswoman said Super Channel plans to try German-language programming in March. Sky Channel is also experimenting with Dutch and German programming.

Advertising Age's top 50 non-U.S. marketers

Unilever ranked No. 1 by ad spending in 1986

Rank	Advertiser	Headquarters	Primary business	Countries in which spending was reported	Non-U.S. spending ¹	U.S. spending ¹	World-wide rank	World-wide spending ¹	Non-U.S. as % of w'wide ¹
1	Unilever NV & PLC	Rotterdam/London	Soaps, toiletries, food	U.K., Spain, Ireland, Puerto Rico, South Africa, Italy, Canada, Austria, Belgium, France, Germany, Netherlands, Portugal, Argentina, Brazil, Chile, Colombia, Australia, Hong Kong, New Zealand, India, Indonesia, Malaysia	\$598,679	\$517,746	3	\$1,116,425	53.4
2	Procter & Gamble Co.	Cincinnati	Soaps, toiletries, food, healthcare	U.K., Ireland, Puerto Rico, Italy, Canada, Austria, Belgium, France, Germany, Chile, Mexico, Philippines	399,514	1,435,454	1	1,834,968	21.8
3	Toyota Motor Corp.	Toyota City, Japan	Automotive	Japan, South Africa, Canada, Belgium, Germany, Switzerland, Australia, Hong Kong, Arabia, Indonesia, Malaysia	248,239	208,877	23	457,116	54.2
4	Nestle SA	Vevey, Switzerland	Food	U.K., Spain, Italy, Canada, France, Germany, Portugal, Argentina, Brazil, Chile, Colombia, Mexico, Australia, Hong Kong, Philippines	244,937	305,451	14	550,388	44.5
5	Ford Motor Co.	Dearborn, Mich.	Automotive	U.K., Spain, Ireland, South Africa, Italy, Canada, Belgium, Finland, France, Germany, Argentina, Australia, Taiwan	243,287	648,500	7	891,787	26.9
6	Nissan Motor Co. Ltd.	Tokyo	Automotive	Japan, U.K., South Africa, Canada, Switzerland, Australia, Arabia	215,998	180,136	29	396,134	54.5
7	Siemens*	Munich	Electronics	Germany	208,936	2,980	46	211,915	98.6
8	Mars Inc.	McLean, Va.	Food	U.K., Ireland, Puerto Rico, Canada, Belgium, Germany, Netherlands, Switzerland, Australia	204,226	312,607	16	516,833	39.5
9	Renault	Paris	Automotive	U.K., Spain, Italy, Canada, France, Portugal, Argentina	196,139	N/A ²	51	196,139	100.0
10	Honda Motor Co. Ltd.	Tokyo	Automotive	Japan, Canada, Hong Kong	190,253	205,082	30	395,335	48.1
11	Fiat SpA*	Turin, Italy	Automotive	U.K., Ireland, Italy, France, Germany	189,722	546	53	190,268	99.7
12	Kao Corp.	Tokyo	Soaps, cleaners	Japan	184,758	0	56	184,758	100.0
13	Matsushita Electric	Osaka, Japan	Electronics	Japan, Canada, Hong Kong, Taiwan, Malaysia, Singapore	175,046	79,809	41	254,854	68.5
14	General Motors Corp.	Detroit	Automotive	U.K., Spain, South Africa, Canada, France, Germany, Switzerland, Brazil, Australia	171,929	839,000	5	1,010,929	16.2
15	Henkel	Duesseldorf	Cleaners	Spain, Italy, Austria, Belgium, France, Germany, Netherlands	166,589	0	64	166,589	100.0
16	Colgate-Palmolive	New York	Soaps, toiletries	Puerto Rico, South Africa, Italy, Austria, France, Germany, Portugal, Colombia, Australia, Hong Kong, Philippines, India, Malaysia	164,464	237,867	28	402,331	40.2
17	Mazda Motor Corp.	Hiroshima	Automotive	Japan, Canada	160,534	156,846	34	317,380	50.6
18	Hitachi Ltd.*	Tokyo	Electronics	Japan, Hong Kong	159,787	9,169	60	168,956	94.6
19	Volkswagen AG	Wolfsburg, W. Germany	Automotive	U.K., Spain, South Africa, Canada, France, Germany, Switzerland, Argentina, Brazil	150,806	152,211	36	303,017	49.8
20	NEC Corp.	Tokyo	Electronics	Japan	148,425	25,090	57	173,515	85.5
21	Sony Corp.	Tokyo	Electronics	Japan, Hong Kong	143,601	44,344	54	187,946	76.4
22	Toshiba Corp.	Tokyo	Electronics	Japan, Hong Kong	142,700	21,942	66	164,642	86.7
23	Lion Corp.	Tokyo	Soaps, toiletries	Japan	140,267	0	73	140,267	100.0
24	Suntory Co.*	Tokyo	Alcoholic beverages	Japan	131,602	1,397	77	132,999	98.9
25	Shiseido Co. Ltd.*	Tokyo	Cosmetics	Japan, Taiwan	126,400	2,104	85	128,503	98.4
26	British Government*	London	Government	U.K.	119,414	0	88	124,432	96.0
27	Sharp Corp.	Osaka, Japan	Electronics	Japan	114,082	4,590	84	128,672	88.7
28	Kellogg Co.	Battle Creek, Mich.	Food	U.K., Ireland, Canada, Mexico, Australia	111,614	374,142	20	485,755	23.0
29	Coca-Cola Co.	Atlanta	Soft drinks, food	U.K., Spain, Ireland, Italy, Canada, Austria, Argentina, Chile, Australia, Hong Kong	111,019	370,379	21	481,398	23.1
30	Daiei Inc.	Kobe, Japan	Retail	Japan	106,444	0	109	106,444	100.0
31	Fuji Photo Film Co.*	Tokyo	Photography	Japan	101,615	10,623	100	112,238	90.5
32	Peugeot*	Paris	Automotive	U.K., Spain, Belgium, France	100,054	6,907	108	106,962	93.5
33	C&A Brenninkmeyer	Amsterdam	Retail	Germany	95,596	0	118	95,596	100.0
34	Philip Morris Cos.	New York	Tobacco, food	U.K., Spain, Canada, Argentina, Brazil, Australia, Hong Kong, Philippines, Arabia	94,412	1,364,467	2	1,458,878	6.5
35	Ajinomoto Co.	Tokyo	Food	Japan	90,360	0	122	90,360	100.0
36	Suzuki Motor Co.	Hamanagun, Japan	Automotive	Japan, Indonesia	88,095	20,920	105	109,015	80.8
37	Takashimaya Co.	Osaka, Japan	Retail	Japan	81,862	0	133	81,862	100.0
38	Hattori Seiko Corp.	Tokyo	Watches, clocks	Japan, Hong Kong, Arabia	80,633	60,912	72	141,545	57.0
39	Kirin Brewery Co.	Tokyo	Alcoholic beverages	Japan	80,460	0	135	80,460	100.0
40	Fujitsu Ltd.*	Tokyo	Electronics	Japan	79,762	1,648	134	81,410	98.0
41	Mitsukoshi Ltd.*	Tokyo	Retail	Japan	78,926	30	136	78,956	100.0
42	Cadbury Schweppes	London	Candy, soft drinks	U.K., Spain, Ireland, Canada, Australia	78,765	59,879	74	138,644	56.8
43	House Food Ind. Co.	Osaka, Japan	Food	Japan	78,753	0	138	78,753	100.0
44	Ferrero*	Perugia, Italy	Candy	Germany, Italy	75,335	8,950	130	84,285	100.0
45	Daimaru Inc.*	Osaka, Japan	Retail	Japan	71,980	0	143	71,980	100.0
46	Hanson Trust PLC*	London	Retail, food	U.K.	66,412	20,593	126	87,005	76.3
47	Guinness*	London	Alcoholic beverages	U.K., Ireland, Malaysia, Singapore	65,693	11,095	139	76,788	85.3
48	Barilla Pasta	Parma, Italy	Food	Italy	64,945	0	164	64,945	100.0
49	Rowntree Mackintosh*	York, U.K.	Retail, food	U.K., Ireland, Canada	64,441	109	167	64,550	99.8
50	NV Philips	Eindhoven, Netherlands	Electronics	Spain, France, Netherlands, Argentina, Brazil, Chile, Hong Kong, Malaysia	63,872	79,377	71	143,249	44.1

Source: ADVERTISING AGE. See Where AA got its data, Page 65. Notes: ¹Dollars are in thousands. ²In 1986 Renault was marketed in the U.S. by American Motors Corp. * indicates that U.S. spending figures include measured media only as reported by BAR/LNA reports. All other U.S. spending figures include estimated unmeasured expenditures. Worldwide expenditures include only those countries listed in the column headed "Countries in which spending was reported."

Compiled by Ilse Cermak and Kevin Brown

Plenty of niches for all comers

To John Eger, a New York-based international communications attorney, the future of global broadcasting is clear: There will be three satellites "each high-powered with a DBS [direct broadcast satellite] distribution system and each [to] cover a third of the Earth."

Arnie Adler



John Eger

Regional systems—proposed or operational—in Japan, Ireland, the U.K. and France—will be the first step toward these "mega-media"

'The potential is not slowing down'

enterprises of the future. Unfortunately, the present is clouded. There are many regulatory barriers that may hinder development, he says.

Mr. Eger sharpened his skills as one of the country's leading experts on international broadcasting while serving in the Nixon White House as telecommunications adviser and as head of the White House Office of Telecommunications. He had been senior VP of CBS Worldwide Enterprises from 1981 until last year.

Mr. Eger says: "The big barrier isn't money; it isn't programming, and it isn't technology. While we don't have satellite interconnects or the regional systems yet, they're coming. The big question mark is really one of law and policy." These laws "stand like a picket fence from one nation to another and inhibit the free flow of information."

"If we want to see something accomplished in our time, advertisers all over the world and those com-

panies looking to develop media must have an alliance for world communications.

"Mega-marketers are going to have to employ the tools of power, public relations and politics to fight these barriers," Mr. Eger said. #

—Verne Gay

Humayun Gauhar, publisher and president of *South*, a London-based monthly magazine focusing on the Third World, said, "I believe the influence of print media will come down a bit with the globalization of television, which I believe cannot be stopped. Print media will have to be more analytical and in-depth. Publications that just cover news will have more trouble than those with a more analytical basis."

"In the past people were very keen to read news from the powerful Western countries like France and the United States. They thought it was the center of the world and



Humayun Gauhar

they were keen to know how they were perceived. Now that is less so. In the Third World—which is 3/4 of the world—the younger generation born after independence has grown up."

Global publications will have to adapt to writing about what interests these people, recognizing that they might want to read about field hockey rather than baseball, he said.

"There will be tremendous difficulty especially in countries with dictatorships. I think a cultural revolution will take place. It will probably lead to a political revolution. If it does, it's their own fault. They didn't allow their own media to develop to combat it and win credibility."

Mr. Gauhar says he considered taking *South* weekly but now thinks the magazine's future lies in foreign-language editions. A Chinese-language version of *South* will begin publication next June in a joint-venture with the Xinhua news agency in China. He says he expects Spanish and Arabic editions to follow. Pakistan-born Mr. Gauhar and his father started *South* in 1980. #

—Laurel Wentz

Robert Maxwell, the British media tycoon who heads Maxwell Communication Corp., London, as chairman, likens the globalization of information and communication to what has happened to the oil in-



Robert Maxwell

dustries since World War II.

Mr. Maxwell said recently before the International Federation of Newspaper publishers, "Information is as vital and as important a commodity as energy. Just as several hundred oil companies of the pre-war period have become compressed into seven multinational giants, so the same will happen in information and communication."

He predicts there will be 10 big global corporations by 2000 dealing in all forms of communications. His company will be one of them, he says. "The new world of order of information throws further responsibilities not only on us as newspaper publishers, but on all those who see the future as I do, in the comprehensive integration of communications and information into globally strategic corporations." #

—Nancy Giges

David Mazzarella, New York-based president of Gannett International, is quite optimistic about the future of global publications, especially his own—*USA Today International*.

While no one can tell what the future will bring for sure, precedent is very encouraging, he noted. "And the global potential is not slowing down," he added.

Mr. Mazzarella pointed out that when a new English-language publication has entered the international marketplace, it has tended to do well without hurting other publications. That was the case with the Financial Times European edition when the *Wall Street Journal* later added its European edition, he noted.

Arnie Adler



David Mazzarella

USA Today International is in an even better position because it has its own distinctive niche, he says, while the market is still expanding. "The fact is there is a good number of people who will read an English-language publication [about life in America while overseas]. We also have the distinction of having a newspaper, which is very close to its natural parent. It's a compact version of the U.S. edition, not a newspaper overloaded with international and economic news." #

—Nancy Giges

William Rukeyser, leaving Time Inc. as director of international business development and who will be editor in chief of Whittle Communications in 1988, says, "Adapting successful American publications to markets overseas has a big future. Advertisers are looking for these types of publications."

In February, New York-based Time Inc. and French publishing giant Hachette-Filipacchi will begin publishing a monthly French-language edition of *Fortune*.

West German sources say Time Inc. is talking with publisher Gruner & Jahr to publish a German-language version of *Fortune*.

Mr. Rukeyser said, "We are having conversations with a number of large publishers outside the U.S." for similar joint ventures for several of the Time Inc. titles.

Arnie Adler



William Rukeyser

"Globally, American-based magazines in the English language are huge and will remain huge," he says. Time Inc. also publishes a Japanese-language edition of *Money* and a *Fortune*-style magazine, called *President* in Japan. #

—Julie Skur Hill

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Source: Information Development Institute, 1986

*Of banks and companies listed on the Tokyo Stock Exchange.

Tables track top 10 ad spenders around the globe

Ranked in the following 34 tables are the largest advertisers in the world, representing spending in 41 countries.

Marketers ranked in the Arabian

Peninsula's top ten represent ad dollars spent in Saudi Arabia, Kuwait, United Arab Emirates, Bahrain, Qatar, Oman and Jordan. Belgium's top ten includes ad

spending in Luxembourg.

Sources and exchange rates are listed beneath tables. For more information on this report, see *Where AD AGE got its data*, Page 65.

AFRICA

South Africa

Advertiser	Ad spending 1986	1985
Unilever	9,860	8,999
O.K. Bazaars	8,121	7,813
Checkers	7,143	3,836
Pick & Pay	7,059	6,443
S.A. Breweries	6,166	5,491
Toyota Motor Corp.	6,157	6,085
United Tobacco S.A.	4,498	3,680
Oudemester	3,583	4,027
SFW	3,527	3,603
Ford Motor Co.	3,469	3,722

Source: Market Research Africa Adindex. Notes: Dollars are in thousands and include measured media only. Conversion rate: 0.4284 dollars to the Rand.

ASIA

Arabian Peninsula

Advertiser	Ad spending 1986	1985
Philip Morris Cos.	6,632	N/A
Rothmans International	3,567	N/A
Toyota Motor Corp.	3,454	N/A
Nissan Motor Co. Ltd.	3,401	N/A
Hattori Seiko Corp.	1,773	N/A
Rado	1,557	N/A

Advertiser	Ad spending 1986	1985
Loews Corp.	1,447	N/A

Source: Pan Arab Research Centre, Kuwait. Notes: Dollars are in thousands. Includes Saudi Arabia, United Arab Emirates, Kuwait, Bahrain, Qatar, Oman and Jordan for year-ending April 1986.

Hong Kong

Advertiser	Ad spending 1986	1985
Philip Morris Cos.	7,065	N/A
Hong Tai Travel	4,634	N/A
Wing On Group	4,497	N/A
Vita Drinks	3,835	N/A
Matsushita Electric Industrial Co.	3,643	N/A
Loews Corp.	3,509	N/A
Morning Star Travel	3,371	N/A
RJR Nabisco	3,132	N/A
Hattori-Seiko Co. Ltd.	3,119	N/A
Mild Seven	2,813	N/A

Source: Hong Kong Abex, a subsidiary of AGB McNair. Note: Dollars are in thousands.

India

Advertiser	Ad spending 1986	1985
Unilever	16,909	12,300
Colgate-Palmolive Co.	4,137	3,952
McDowell & Co. Ltd.	3,893	2,378
Peico Electronics & Electricals	3,561	2,663
ITC Ltd.	3,236	2,826
Glaxo Laboratories	2,758	1,948
Escorts Ltd.	2,701	2,374
Bombay Dyeing Ltd.	2,446	1,974
Bata India Ltd.	2,221	1,474
Tata Oil Mills	2,173	1,401

Source: Economic Times Research Bureau, New Delhi. Notes: Dollars are in thousands for years-ending March 1986 and 1985. Conversion rate: 0.0805 dollars to the Rupee.

Indonesia

Advertiser	Ad spending 1986	1985
Unilever	3,129	N/A
Suzuki Motor Co.	1,473	N/A
Toyota Motor Corp.	1,388	N/A
Daihatsu Cars	1,169	N/A
Lux Soap	774	N/A
Baygon Insecticide	765	N/A
Citra Lotion	740	N/A
Dancow Milk Powder	732	N/A

Source: Advertising Age. Notes: Dollars are in thousands. Conversion rate: 0.000841 dollars to the Rupiah.

Japan

Advertiser	Ad spending 1986	1985
Kao Corp.	184,758	177,311
Honda Motor Co. Ltd.	184,470	149,006
Toyota Motor Corp.	173,428	175,890
Nissan Motor Co. Ltd.	163,136	158,077
Matsushita Electric Industrial Co.	160,211	158,939
Hitachi Ltd.	158,117	152,328
Mazda Motor Corp.	155,584	120,795
NEC Corp.	148,425	115,596
Sony Corp.	142,471	106,960
Toshiba Corp.	140,741	151,988

Source: MOF Portfolio Reports, Tokyo. Notes: Dollars are in thousands for years-ending March 1986 and 1985. Figures do not include foreign company ad spending. Conversion rate: 0.005769 dollars to the Yen.

Malaysia

Advertiser	Ad spending 1986	1985
Rothmans International	14,819	7,623
Malaysian Tobacco Co.	11,334	8,869
Nupro	7,516	8,031
Unilever	4,514	3,085
Colgate-Palmolive	4,325	3,352

Advertiser	Ad spending 1986	1985
RJR Nabisco	3,463	3,641
Matsushita Electric Industrial Co.	1,825	3,324
Ederan Otomobil Nasional Sdn. Bhd.	1,528	849
Guinness	1,289	N/A
Toyota Motor Corp.	1,229	2,304

Source: Survey Research Malaysia. Notes: Dollars are in thousands and include TV, radio, newspaper, magazine and video. Conversion rate: 0.433 dollars to the M-dollar.

New Zealand

Advertiser	Ad spending 1986	1985
FTC Farmers	4,839	N/A
F.W. Woolworth Co.	3,538	N/A
New World Supermarkets	3,330	N/A
Smith & Brown	1,680	N/A
McDonald's Corp.	1,349	N/A
Four Square	1,275	N/A
United Building Society	1,240	N/A
NZ Listener	1,194	N/A
Foodtown	1,139	N/A
PepsiCo Inc.	1,139	N/A

Source: Hunter: AGB Ltd., Auckland. Notes: Dollars are in thousands and include TV and print only. Conversion rate: 0.5252 dollars to the NZ dollar.

Philippines

Advertiser	Ad spending 1986	1985
San Miguel Corp.	767	N/A
Nestle S.A.	639	N/A
Colgate-Palmolive Co.	613	N/A
Philippine Refining	613	N/A
Procter & Gamble Co.	409	N/A
California Manufacturing	153	N/A
Warner-Lambert Co.	102	N/A
Philip Morris Cos.	77	N/A
Johnson & Johnson	61	N/A
RJR Nabisco	46	N/A

Source: J. Walter Thompson Co., Manila. Notes: Dollars are in thousands and include measured and unmeasured media. Conversion rate: 0.0511 dollars to the Peso.

Singapore

Advertiser	Ad spending 1986	1985
Yaohan Stores	1,623	N/A
American Express Co.	1,577	N/A
McDonald's Corp.	1,438	N/A
PepsiCo Inc.	1,113	N/A
Federal Publication	1,020	N/A
Metro Stores	881	N/A
Singapore International Airlines	881	N/A
Guinness	835	N/A
Citicorp	696	N/A
Matsushita Electric Industrial Co.	696	N/A

Source: Survey Research Singapore Ltd. Notes: Dollars are in thousands. Conversion rate: 0.4638 dollars to the S-dollar.

South Korea

Advertiser	Ad spending 1986	1985
Goldstar & Lucky Ltd.	29,232	23,446
Samsung Electronics & Jeil Sugar	27,932	25,981
Daewoo Electronics & Motors	17,883	12,810
Pacific Chemical	14,800	12,934
Lotte Confectionary	8,794	6,676
Nhong Shim	8,619	8,817
Yuhan Corp.	7,785	7,134
Samyang Foods	7,743	5,916
Dong-A Pharmaceuticals	7,544	6,834
Hai-Tai Confectionary	7,483	6,874

Source: Korea First Advertising. Notes: Dollars are in thousands. Conversion rate: 0.001131 dollars to the Won.

Taiwan

Advertiser	Ad spending 1986	1985
China Airlines	8,987	N/A
Peiuf Enterprises	8,533	N/A
President Enterprises Corp.	6,693	N/A
Matsushita Electric Industrial Co.	5,663	N/A
Anping Distributors Ltd.	4,376	N/A
Weichuan Foods Corp.	3,919	N/A
Sanyo Electric Co. Ltd.	3,802	N/A
Taiwan Kao Corp.	3,500	N/A
Hey-Song Corp.	3,383	N/A
Formosa United Industrial Corp.	3,349	N/A

Source: Advertising Age. Notes: Dollars are in thousands. Figures were reported in U.S. dollars.

AUSTRALIA

Australia

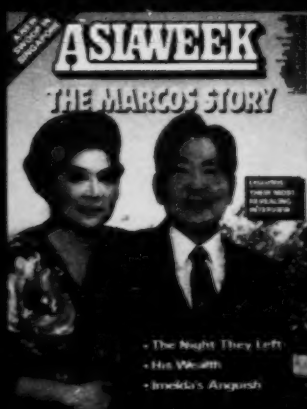
Advertiser	Ad spending 1986	1985
G.J. Coles & Co. Ltd.	63,813	53,382
Mars Inc.	27,067	21,932
Unilever	19,441	17,094
Australian Gov't	18,936	11,704
Telecom Australia	17,445	13,478
F.W. Woolworth Co.	15,842	16,292
Cadbury Schweppes PLC	14,797	16,311
Reckitt & Colman PLC	14,480	12,926
Nissan Motor Co. Ltd.	12,969	10,085
Amatil Ltd.	12,861	12,478

Source: Tart Research, Brookvale, Australia. Notes: Dollars are in thousands and include all measured media. Conversion rate: 0.8769 dollars to the A-dollar.

OUR BUSINESS IS EXPA



The most widely read newsmagazine in the world. The international editions of TIME circulate in 191 countries. Circulation: 1,300,000



ASIaweek, the first pan-regional Asian newswire, joined the Time Inc. family of magazines in 1985. Circulation: 65,000



Prepared especially for the Japanese market, MONEY Japan is published with the Seibu Saison Group. Circulation: 370,000



FORTUNE International enjoys the largest circulation outside the U.S. of any American business publication. Circulation: 100,000

EUROPE

Austria

Advertiser	1986	1985
Unilever	9,383	17,541
Henkel	7,301	7,484
Creditanstalt Bankverein	3,956	2,726
Drogeriemarkt	3,754	3,022
Procter & Gamble Co.	3,527	4,638
Kastner & Ohler	3,515	2,461
BAWAG	2,269	3,048
Kika Moebelhandel	2,934	2,751
Billa Konzern	2,814	2,398
Kleider-Bauer	2,650	2,335

Source: A.C. Nielsen & Co. and MMO Media and Market Observer. Notes: Dollars are in thousands. Conversion rate: 0.0631 dollars to the Schilling.

Belgium

Advertiser	1986	1985
Procter & Gamble Co.	7,848	8,342
GB-Inno-BM	7,224	8,063
BSN-Gervais Danone	7,160	5,805
Heinkel	6,493	5,913
D'Ieteren	6,192	6,515
Peugeot	5,848	5,440
Ford Motor Co.	5,784	4,429
Delhaize Le Lion	5,698	5,612
Unilever	5,676	4,085
Mars Inc.	5,633	4,924

Source: Advertising Marketing Services, Brussels. Notes: Dollars are in thousands and include all public measured media in Belgium and Luxembourg. Conversion rate: 0.0215 dollars to the Franc.

Finland

Advertiser	1986	1985
Valio	10,938	6,457
Kesko	7,620	6,282
SYP	7,039	N/A
Korpivaara	6,515	5,449
Saastopankit + SKOP	6,360	5,662
Verkkauus	5,604	N/A
Aro-yhtyma	5,410	N/A
Onuspankit + OKO	5,197	4,789
Ford Motor Co.	4,854	4,363
OP-Kiinteistokeskus	4,266	4,324

Source: Markkinatutkimus OY, Helsinki. Notes: Dollars are in thousands and include measured media only. Conversion rate: 0.1939 dollars to the Markka.

France

Advertiser	1986	1985
Renault	83,927	73,096
Loterie Nationale	48,333	34,009
Nestle SA	41,192	35,384
Ford Motor Co.	40,911	36,085
Procter & Gamble Co.	36,310	41,978
Peugeot	36,225	27,513
Colgate-Palmolive Co.	35,945	26,517
Citroen	30,094	26,517
Intermarche Magasins	29,786	21,564
General Motors Corp.	28,481	26,180

Source: SECODIP, Paris. Notes: Dollars are in thousands. Conversion rate: 0.1403 dollars to the Franc.

Ireland

Advertiser	1986	1985
Procter & Gamble Co.	85,751	47,374
Guinness	54,092	52,160
Kellogg Co.	39,294	32,870
Rowntree Macintosh	32,398	30,988
Unilever	28,851	30,988
Cadbury Schweppes PLC	27,477	24,545
Coca-Cola Co.	26,340	12,371
Ford Motor Co.	24,979	19,134
P.J. Carroll	22,475	16,177

Source: Advertising Statistics Ireland. Notes: Dollars are in thousands and include measured media only. Conversion rate: 1.313 dollars to the Pound.

Italy

Advertiser	1986	1985
Procter & Gamble Co.	116,210	62,085
Unilever	100,560	39,299
Fiat SpA	94,344	101,529
Barilla Pasta	64,945	43,418
Renault	56,241	36,460
Sagit	51,447	32,755
Alfa Lancia	50,161	31,052
Fater	48,323	32,940
Colgate-Palmolive Co.	47,463	25,123
Mattel Inc.	44,018	36,119

Source: AGB Italia SpA, Milan. Notes: Dollars are in thousands and represent gross ad expenditures. It is custom in Italy to take a 40% to 60% discount. Conversion rate: 0.000648 dollars to the Lira.

Netherlands

Advertiser	1986	1985
Unilever	19,268	N/A
Mars Inc.	8,032	N/A
Heineken B.V.	7,139	N/A
Vendex	6,880	N/A
NV Philips	6,767	N/A
Postbank NV	6,652	N/A
Akzo Adv. Coord. Groep	6,427	N/A

Advertiser	1986	1985
Rijksoverheidsdienst	6,132	N/A
Henkel	5,343	N/A
Ned. Zuivelburo	5,275	N/A

Source: VEA. Notes: Dollars are in thousands and do not include regional advertisers or direct mail. Conversion rate: 0.3934 dollars to the Guilder.

Portugal

Advertiser	1986	1985
Unilever	4,461	2,199
Central Cervejas	2,109	1,129
Nestle SA	2,036	1,537
Santa Casa da Misericordia	1,838	2,312
Colgate-Palmolive Co.	1,510	855
Renault	1,509	909
FIMA	1,334	1,029
S.C. Johnson & Son	1,314	1,039
Unicer	1,007	789
Knorr Portuguesa	972	N/A

Source: Lintas: Worldwide, Lisbon. Notes: Dollars are in thousands. Conversion rate: 0.006683 dollars to the Escudo.

Spain

Advertiser	1986	1985
El Corte Ingles Group	28,115	23,823
Peugeot	26,014	20,919
Volkswagen AG	25,205	24,207
Renault	24,451	19,328
Nestle SA	23,913	14,937
Unilever	23,851	15,496
Ministry of Economy	22,036	21,813
Henkel	22,015	13,758
Ford Motor Co.	16,536	12,669
BSN-Gervais Danone	14,798	13,094

Source: Annual Report on Advertising Expenditures by J. Walter Thompson Co., based on Repress/Nielsen data. Notes: Dollars are in thousands and include measured media, direct marketing, point of sale, promotions, trade fairs, annual reports and brochures. Conversion rate: 0.00698 dollars to the Peseta.

Sweden

Advertiser	1986	1985
Kooperativa Forbundet	53,528	51,277
ICA	47,534	46,609
Ahlens	14,735	12,139
B & W Stormarknader	11,172	6,988
Hennes & Mauritz	9,170	8,203
Kappahl	6,808	5,234
Samhallsinformation		
Kommun/Landsting	6,781	6,380
Volvo AB	6,463	7,457
Favor-Butikerna	6,394	5,648
Televerket	5,759	5,524

Source: Reklamstatistik. Notes: Dollars are in thousands and include daily newspapers only. Conversion rate: 0.1361 dollars to the Kroner.

Switzerland

Advertiser	1986	1985
Migros	36,165	36,767
Co-op	26,251	22,936
Denner	10,737	10,057
General Motors Corp.	10,006	9,657
Toyota Motor Corp.	9,928	8,911
Pfister Moebel	7,276	5,988
Maus Brothers	7,169	6,954
Mars Inc.	6,763	4,992
Volkswagen AG	6,491	6,451
Nissan Motor Co. Ltd.	6,404	5,212

Source: A.C. Nielsen & Co. Notes: Dollars are in thousands. Conversion rate: 0.5371 dollars to the Franc.

United Kingdom

Advertiser	1986	1985
Unilever	156,171	179,192
British Government	119,414	46,631
Mars Inc.	68,690	82,647
Hanson Trust PLC	66,412	N/A
Allied-Lyons	59,139	53,410
Asda MFI Group	56,201	55,311
Nestle SA	53,279	59,437
British Telecom	52,968	60,582
Procter & Gamble Co.	51,763	70,029
British Gas	48,323	28,166

Source: Campaign magazine, from Haymarket Publishing: The Top 100 Spenders, June 13, 1986. Notes: Dollars are in thousands. Conversion rate: 1.4679 dollars to the Pound.

West Germany

Advertiser	1986	1985
Siemens	208,936	N/A
Unilever NV	102,915	88,276
C&A Brenninkmeyer	95,596	94,487
Volkswagen AG	60,951	59,886
Henkel	60,773	54,563
General Motors Corp.	51,458	35,375
Karstadt	47,554	47,909
Mars Inc.	43,162	33,714
Ford Motor Co.	41,787	34,157
Deutsche Bundespost	39,480	32,826

Source: Schmidt & Pohlmann, a subsidiary of A.C. Nielsen & Co. Notes: Dollars are in thousands. Conversion rate: 0.4436 dollars to the Mark.

N. AMERICA

Canada

Advertiser	1986	1985
Canadian Government	45,912	51,443

Advertiser	1986	1985
Procter & Gamble Co.	36,858	33,344
John Labatt Ltd.	27,097	24,694
Unilever	23,162	22,421
Molson Breweries	23,075	21,347
Philip Morris Cos.	22,522	21,321
General Motors Corp.	19,714	22,404
Gov't of Ontario	18,759	25,117
Thomson Group	17,300	12,845
RJR Nabisco	16,162	18,416

Source: Media Measurement Services, Toronto. Notes: Dollars are in thousands. Conversion rate: 0.721 dollars to the Cdollar.

Mexico

Advertiser	1986	1985
Pedro Domecq	12,740	N/A
Procter & Gamble Co.	12,740	N/A
Bacardi Corp.	11,830	N/A
Grupo Cuauhtemoc	9,828	N/A
Colgate-Palmolive Co.	9,646	N/A
Nestle SA	9,100	N/A
Organisacion Binimo	6,552	N/A
PepsiCo	6,188	N/A
Gamesa	5,824	N/A
Kellogg Co.	5,824	N/A

Source: PMP Group, Mexico City. Notes: Dollars are in thousands and include TV ad expenditures only. Conversion rate: 0.00182 dollars to the Peso.

Puerto Rico

Advertiser	1986	1985
Colgate-Palmolive Co.	7,952	6,540
Procter & Gamble Co.	7,220	6,793
Sears, Roebuck & Co.	6,684	4,398
Unilever	6,465	6,092
Bacardi Corp.	4,672	N/A
Banco Popular Puerto Rico	4,273	1,575
Schaefer Brewing	3,318	1,901
Mars Inc.	2,536	538
Gillette Co.	2,434	1,533
Anheuser-Busch Cos.	2,225	1,430

Source: Publish Records Service, San Juan. Notes: Dollars are in thousands and include TV and print media spending only.

United States

Advertiser	1986	1985
Procter & Gamble	1,435	1,600
Philip Morris Cos.	1,364	1,400
Sears, Roebuck & Co.	1,005	800
RJR Nabisco	935	1,093
General Motors Corp.	839	779
Ford Motor Co.	649	615
Anheuser-Busch Cos.	644	523
McDonald's Corp.	592	550
K mart Corp.	590	567

(Continued on Page 65)

ENDING HORIZONS.

プレジデント 5
特集「変化こそチャンス」時代のニュー
ビジネスのチャンス



The largest business magazine in Japan. PRESIDENT is published in cooperation with the Diamond Co. Circulation: 250,000



LA NAISSANCE D'UN PATRON

A French FORTUNE will be published early in 1988 in cooperation with Hachette-Filipacchi. Circulation: 50,000



YAZHOU ZHOUKAN, the world's first independent newsweekly in Chinese, publishes in December, 1987. Circulation: 38,000

Around this planet, readers find a wider vision of their world in the international publications of Time Inc.

Our magazine group is growing to meet their growing needs for quality information. The two newest magazines: a handsome new French Fortune and Yazhou Zhoukan, the world's first newsweekly in Chinese.

Our business is expanding horizons. With increasing editorial resources. A wider range of magazines. And a growing audience of the world's most desirable readers.

The International Publications of Time Inc.

Australian media barons' year of changes

Rupert Murdoch's takeover of HWT sparks \$4 billion in deals

Major media owners	Major holdings as of January 1987	Trading	Holdings at present
News Ltd. Rupert Murdoch	<i>The Australian</i> , national <i>The Daily Telegraph</i> , Sydney, a.m. <i>The Mirror</i> , Sydney, p.m. <i>The News</i> , Adelaide, p.m. <i>The Sunday Telegraph</i> , Sydney <i>Daily Sun</i> , Brisbane, p.m. <i>Sunday Sun</i> , Brisbane <i>Sunday Mail</i> , Adelaide Eight suburban newspapers near Sydney TEN Network, Sydney and Melbourne Southdown Press magazine group and other magazines	News Ltd.'s \$1.4 billion takeover of Herald & Weekly Times Group started the media buying and selling spree. Mr. Murdoch sold his TV holdings—TEN Network in Sydney and Melbourne to Frank Lowy, Channel 7 in Melbourne to Fairfax—and HWT's Perth newspapers to Bell Group. <i>The News</i> , Adelaide, and <i>Daily Sun</i> and <i>Sunday Sun</i> in Brisbane was sold to Northern Star Holdings and staff consortiums.	<i>The Australian</i> , national <i>The Daily Telegraph</i> , Sydney, a.m. <i>The Mirror</i> , Sydney, p.m. <i>The Sunday Telegraph</i> , Sydney <i>Sunday Mail</i> , Adelaide Eight suburban newspapers near Sydney Southdown Press magazine group and other magazines <i>Melbourne Herald</i> , Melbourne, p.m. <i>Sun News-Pictorial</i> , Melbourne, p.m. <i>Courier Mail</i> , Brisbane, a.m. <i>The Telegraph</i> , Brisbane, p.m. <i>The Advertiser</i> , Adelaide, a.m. Herald & Weekly Times Group with 20 magazines—plus about 20 suburban newspapers
Herald & Weekly Times	<i>Melbourne Herald</i> , Melbourne, p.m. <i>Sun News-Pictorial</i> , Melbourne, p.m. <i>Courier Mail</i> , Brisbane, a.m. <i>The Telegraph</i> , Brisbane, p.m. <i>The Advertiser</i> , Adelaide, a.m. <i>The West Australian</i> , Perth, a.m. <i>The Daily News</i> , Perth, p.m. <i>The Sunday News</i> , Perth, p.m. <i>Sunday Mail</i> , Brisbane Channel 7, Melbourne, Adelaide Herald & Weekly Times Group with about 20 magazines	Entire company sold to News Ltd.	None
John Fairfax Ltd. Warwick Fairfax	<i>Sydney Morning Herald</i> , Sydney, a.m. <i>The Sun</i> , Sydney, p.m. <i>Sun Herald</i> , Sydney <i>The Australian Financial Review</i> , national <i>The Age</i> , Melbourne, a.m. <i>The Canberra Times</i> , Canberra, a.m. <i>The Times on Sunday</i> , national <i>Newcastle Herald</i> , a.m. <i>Illawarra Mercury</i> , a.m. 10 community newspapers 24 Victorian regionals and suburbs Fairfax Magazines incorporating <i>Woman's Day</i> , <i>Cosmopolitan</i> , <i>Dolly</i> , <i>Time Australia</i> , <i>The Spectator</i> , weekly <i>BRW</i> , weekly <i>Personal Investments</i> , weekly Rydge magazines Macquarie Network (radio) Channel 7, Sydney, Brisbane	John Fairfax Ltd. first bought Channel 7 in Melbourne from News Ltd. in July but later sold that station, along with stations in Sydney and Brisbane to Universal Telecasters. In early fall, Warwick Fairfax attempted to privatize the company, but met trouble from Mr. Holmes a' Court and Mr. Packer, who each owned sizable stakes. Both received properties in exchange for their cooperation. Mr. Fairfax is expected to attain control of the company soon. John B. Fairfax (deputy chairman) purchased John Fairfax Ltd.'s rural press and suburban newspapers.	<i>Sydney Morning Herald</i> , Sydney, a.m. <i>The Sun</i> , Sydney, p.m. <i>Sun Herald</i> , Sydney, Sunday <i>The Age</i> , Melbourne, a.m. <i>BRW</i> <i>Personal Investment</i> Rydges magazines <i>Time Australia</i> , weekly <i>The Spectator</i> , weekly <i>Ms.</i> , monthly <i>Sassy</i> , monthly
Australian Consolidated Press Kerry Packer	Nearly 30 magazines, including <i>Women's Weekly</i> and <i>The Bulletin</i> , incorporating <i>Newsweek</i> , <i>Cleo</i> , <i>Belle</i> and <i>Australian Business</i> . Nine Network in Sydney, Melbourne, Brisbane.	ACP sold the Nine Network to Alan Bond. Mr. Packer obtained several Fairfax properties, including much of its magazine group.	Fairfax Magazines, about 30 titles Nearly 30 magazines, including <i>Women's Weekly</i> and <i>The Bulletin</i> , incorporating <i>Newsweek</i> and including <i>Woman's Day</i> , <i>Dolly</i> , <i>Cosmopolitan</i> .
Bell Group Robert Holmes a' Court	<i>Western Mail</i> , Perth Four suburban weeklies, two regional newspapers and four radio stations in Western Australia Channel 7, Perth Channel 10, Adelaide	Mr. Holmes a' Court, who has emerged as a major media owner this year, unsuccessfully attempted to buy News Ltd.'s Channel 7 in Melbourne, but succeeded in buying HWT's Perth papers. Mr. Holmes a' Court received the <i>Financial Review</i> , <i>The Times on Sunday</i> , the <i>Canberra Times</i> , and the Macquarie radio network in the deal with Fairfax.	Channel 10, Adelaide <i>The West Australian</i> , Perth, a.m. <i>The Daily News</i> , Perth, p.m. <i>The Sunday News</i> , Perth, p.m. <i>The Australian Financial Review</i> , national <i>The Times on Sunday</i> , national <i>The Canberra Times</i> , Canberra, a.m. Macquarie Radio Network Expected to sell Channel 7, Perth to Universal Telecasters
Bond Media Alan Bond	Channel 9 in Perth Sky Channel satellite	Mr. Bond became a major media owner this year, with purchases such as ACP's Nine Network.	Nine Network in Sydney, Melbourne, Brisbane and Perth Sky Channel Intelsat Nine Network satellites, plus 30-watt transponder TV-AM, London Fiji TV Papua New Guinea TV Nine radio stations throughout Australia WIN News (New York) Interests in film and TV marketing and production
Universal Telecasters Christopher Skase	Channel 0, Brisbane Two regional channels	Universal Telecasters bought John Fairfax Ltd.'s Seven Network stations in Sydney, Melbourne and Brisbane. It sold Channel 0, Brisbane, to Northern Star Holdings.	Two regional channels Seven Network in Sydney, Melbourne and Brisbane Expected to buy Channel 7 in Perth from Bell Group
BDC Investments Kerry Stokes	Channel 7, Canberra, Adelaide TEN Network in Perth	BDC exited the media scene by selling its Channel 7 in Canberra and Adelaide and Channel 10 in Perth to Frank Lowy. Mr. Stokes is likely to reenter media through buying regional stations.	No media holdings
Northern Star Holdings, Westfield Capital Corp. Frank Lowy	Northern Star Holdings newspaper group of eight regional papers	Mr. Lowy purchased Mr. Murdoch's TEN Network as well as the <i>News</i> , Adelaide, and Brisbane's <i>Daily</i> and <i>Sunday Suns</i> , as well as BDC's entire stable.	Northern Star Holdings newspaper group TEN Network in Sydney, Melbourne and Perth, Channel 7 in Adelaide and Canberra, Channel 0 in Brisbane and one regional, four radio stations, Festival Records

Where Ad Age got its data

ADVERTISING AGE in this special section takes a look at worldwide advertising from both the media and advertiser side.

In its first ranking of the 50 largest non-U.S. advertisers, AD AGE pooled ad totals from its international reporting network and sources around the world.

Rankings of advertisers from 34 regions on six continents were compiled, including the Arabian Peninsula, Hong Kong, India, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, South Korea, Taiwan, Argentina, Brazil, Chile, Colombia, Australia, Austria, Belgium, Finland, France, West Germany, Ireland, Italy, the Netherlands, Portugal, Spain, Sweden, Switzerland, the U.K., Canada, Mexico, Puerto Rico, South Africa

and the U.S.

The Arabian Peninsula includes Saudi Arabia, United Arab Emirates, Kuwait, Bahrain, Qatar, Oman and Jordan. Belgium includes spending in Luxembourg.

Although every effort was made to compile advertising expenditures by these companies in all countries, only rankings of the top 10 advertisers were available in some countries.

Data from several countries was reported by brand, rather than by advertiser. Brand spending was added into parent company spending wherever possible. Also, in some instances, local sources compiled parent company spending by monitoring brand spending—but only including brands closely associated with the parent company. This re-

sulted in some low local parent total spending figures.

Local sources and media information are listed beneath the top ten advertisers by country on Page 62.

Data from the U.S. is based on AA's 100 Leading National Advertisers, Sept. 4, 1987, and Second 100 Leading National Advertisers, Nov. 23, 1987.

BAR/LNA reports supplies the bulk of U.S. measured media information. Magazine and newspaper supplements are supplied to Leading National Advertisers by Publishers Information Bureau. Outdoor is supplied to LNA by the Outdoor Advertising Association of America and Institute of Outdoor Advertiser. Network TV, spot TV, network radio and cable TV networks are supplied by Broadcast

Advertisers Reports.

Other U.S. monitored media include newspapers from Media Records, business publications from Rome Reports, farm publications from AGRICOM and spot radio from Radio Expenditure Reports.

U.S. advertising expenditures include estimated unmeasured media spending for direct mail, promotion, co-op and couponing, to name a few, unless otherwise noted.

The worldwide ranking includes all advertisers monitored by AD AGE, regardless of whether any foreign advertising expenditures were reported for this issue.

AD AGE's third annual compilation of the key indicators judging global publications appears in chart form on Page 54. Criteria for a

publication's admission to the chart were:

- Substantial mass circulation on at least three continents.
- Worldwide circulation of at least 50,000, although the circulation of its international editions must equal at least 10% of the domestic circulation.
- Editorial content global in scope and primarily in English.
- Advertising in all editions purchased through one central office.

Trade publications are not mass-circulation publications and were excluded from this listing.

Licensed publications also were excluded because, for the most part, they are not centrally controlled either on the advertising or editorial side.

Kevin Brown

Top 10

(Continued from Page 63)

Advertiser	Ad spending	
	1986	1985
PepsiCo	581	478
Source: Advertising Age 100 Leading National Advertisers, September 24, 1987, including data from BAR/LNA reports, Media Records, Radio Expenditure Reports, Rome Reports and AGRICOM. Notes: Dollars are in millions and include measured and unmeasured media.		

S. AMERICA

Argentina

Advertiser	Ad spending	
	1986	1985
Aurora	12,092	2,788
Philip Morris Cos.	9,034	2,981
Batav Industries	8,123	3,717
NV Philips	7,379	3,007
Unilever	6,004	3,291
S.C. Johnson & Son	5,567	N/A
Kenia Saic	5,022	1,122
Jacobs Suchard	4,730	2,321
Loterie Chaquena	4,627	3,156
Drean	4,544	1,059

Source: Fuentes & CIA, Buenos Aires. Notes: Dollars are in thousands and include TV ad spending only. Conversion rate: 1.184 dollars to the Austral.

Brazil

Advertiser	Ad spending	
	1986	1985
Grupo Dorsay	25,287	13,338
Grupo Pao de Acucar	18,070	10,772
Unilever	13,520	6,295
Nestle SA	11,884	5,735
Lopes Cons Imoveis	11,484	2,042
Mesbia	10,867	7,080
Lundgren	10,234	4,870
NV Philips	10,220	4,884
CX Economica Federal	10,052	2,973
B.A.T. Industries	9,725	6,433

Source: Advertising Age. Notes: Dollars are in thousands and include measured media only. Conversion rate: 0.072686 dollars to the Cruzeiro.

Chile

Advertiser	Ad spending	
	1986	1985
Unilever	12,547	N/A
Nestle SA	6,368	N/A
Coca-Cola Co.	3,359	N/A
Bayer AG	3,196	N/A
Corona	2,783	N/A
CCU	2,698	N/A
Comercial Eccsa	2,530	N/A
El Mercurio	2,459	N/A
Editorial Portada	2,310	N/A
La Tercera	2,142	N/A

Source: Megatec, Santiago. Notes: Dollars are in thousands. Conversion rate: 0.0054 dollars to the Peso.

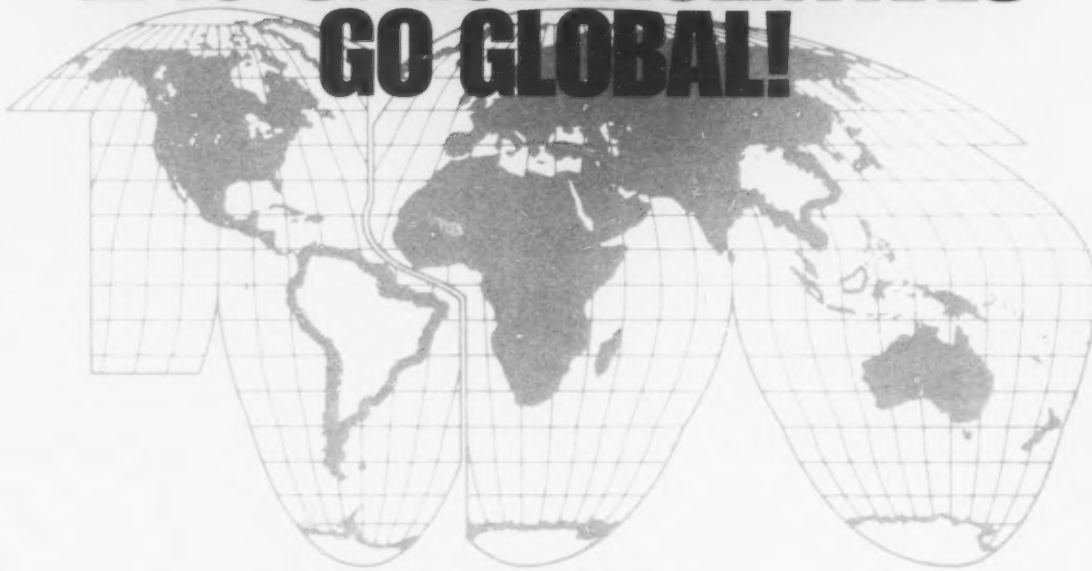
Colombia

Advertiser	Ad spending	
	1986	1985
Colgate-Palmolive Co.	7,663	N/A
Unilever	6,642	N/A
Postobon	5,017	N/A
Nestle SA	4,293	N/A
Technoquimicas	2,711	N/A
Varela	2,624	N/A
Gillette Co.	2,603	N/A
Disa	2,446	N/A
Cine Colombia	1,998	N/A
Federacion Nati de Cafeteros	1,814	N/A

Source: A.C. Nielsen & Co. Notes: Dollars are in thousands and include measured media only. Conversion rate: 0.0054 dollars to the Peso.

Coordinating this report were Kevin Brown, Ilse Cermak, Craig Endicott, Karen Brodsky Fine, Nancy Giges and Julie Skur Hill.

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WASHINGTON
4520 EAST-WEST HWY #800
SRI ACQUISITION
CONGRESSIONAL INFO SERVICE
200 8751 COMP
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12/22/87 C 2710-1

\$1.50 a copy; \$59 a year

December 21, 1987

Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Make-goods stagger networks

By VERNE GAY

NEW YORK—The people-meter revolution is costing the Big 3 TV networks millions of dollars in advertiser "make-goods," setting the stage for possible changes in the way commercial airtime is purchased.

The demand for make-goods will accelerate during the next two weeks as advertisers scramble to secure what is due them for the fourth quarter.

The problem is so troublesome that some agency and network TV executives are contemplating changing next year's buying practices to eliminate guarantees on upfront—or advanced—buys.

In an upfront buy, advertisers purchase time as much as a year in advance and get a "guarantee" that the buy will meet certain ratings goals.

If the TV show falls short, the advertiser gets make-goods

in the form of commercial units.

This season's paybacks are the result of an unexpectedly severe drop-off in daytime and prime-time ratings by A.C. Nielsen Co.'s people meters, which in September replaced

Apple buys Jan. 1—Page 2

the traditional diary system of measuring TV audiences.

The blow may be softened somewhat by a so-called "cushion" the nets built into last summer's upfront buys, to compensate for the unknowns involved in the change-over.

At that time, many advertisers agreed to pay the networks artificially-arrived-at prices and slight cost-per-thousand increases. The average cushion at ABC was 5%,

while CBS' cushion was 7.5%.

Sources said CBS has been particularly hard hit by the make-goods situation. The network's 1987 national prime-time household ratings have fallen 15% from the same period last year. Fourth-quarter daytime ratings have fallen 10%, from 1986 to 1987, although CBS News ratings have increased.

CBS reportedly has exhausted its reserve of commercial time—that which it held from the market to satisfy make-good demand. The network said it is covering shortfalls with units it would have sold during the "scatter" market, the time sold much closer to actual airdate.

Unusually large reserves of make-good slots were set aside during upfront sales, again because of the expected lower numbers. But CBS' reserve reportedly is the smallest.

NBC's was the largest, but it is believed to be close to (Continued on Page 34)



Mistletoe Bears weren't selling fast enough at Marshall Field's so the retailer posted a 33%-off sign.

Bear market

Hot holiday promotion cools off

Aa Advertising Age roundup

Stuffed Christmas bears, the hot promotional trend of the last few years, are stumbling in the final stretch of this holiday season.

In sharp contrast to their wild popularity last year, the plush-animal ploys—sold at a discount to shoppers who spend above a certain amount—overall in the store—are moving slowly in some major outlets.

It is a case of a good idea that got old and tired, retail experts speculate. "It was a fad that has run its course. As a special promotional gimmick, I think it's passe," said Kurt Barnard, publisher of *Retail Marketing Report*, New York.

"The market is saturated with the creatures," said James Williams, president of the National Retail Merchants Association.

Only those merchants who ordered conservatively or jazzed up the marketing of their purchase-with-purchase toys have enjoyed good sales, it seems. For instance, Dayton Hudson Corp., Minneapolis, which launched the trend with its hugely successful Santa Bear, still is going gang-

busters with its bear family, helped by merchandise and advertiser tie-ins.

Elsewhere, however, the promotion is faltering, either because too many stores are doing the (Continued on Page 34)

HOLIDAY MARKETING

WPP ponders sister agency to Thompson

By LAUREL WENTZ

LONDON—WPP Group is considering setting up a second agency network in Europe to operate separately from J. Walter Thompson Co.

The decision hinges on whether the agency group wins the European account of Alfa Romeo, the Italian automaker seeking an international network for its \$20 million ad business.

WPP Chairman Martin Sorrell is believed to be masterminding a plan that would circumvent the conflict problems faced by JWT, which handles \$300 million of Ford Motor Co. business in the U.S. and other countries.

JWT's Ford business, however, is diminishing. Last week, Ford

shifted \$5 million in billings from JWT in Latin America.

Ford moved \$100 million from JWT in Europe to Ogilvy & Mather in July, and the company has refused to allow JWT to take on competing car accounts.

A new agency network would operate separately from JWT as a wholly owned WPP Group subsidiary, sources said.

The offices would be "set up uniquely to do that [Alfa] job," sources said, but could serve as a base for winning new business. Even though it would be separate from JWT, such a network could draw on JWT resources and staff, agency sources said.

Oddone Camerana, ad director of Fiat S.p.A., Turin, Italy, which (Continued on Page 34)

Last Minute News

BBDO resigns GE consumer electronics

NEW YORK—BBDO Worldwide has withdrawn from GE/RCA Consumer Electronics' review of its \$15 million-to-\$20 million combined account. Still competing for the business are Ammirati & Puris, McCaffrey & McCall and Young & Rubicam; Fallon McElligott, Minneapolis; and Hal Riney & Partners, Chicago. Leo Burnett USA, Chicago, earlier resigned the RCA portion of the account, citing demands for reduced compensation (AA, Oct. 5, et seq.). BBDO had handled the GE division.

Donald Mitchum leaves L.A. for Atlanta

LOS ANGELES—BBDO/West President Donald C. Mitchum, 50, will leave his post in mid-January to become president of the agency's Atlanta office. He succeeds Atlanta President-CEO F. Glenn Verrill, who will retire within a year. Mr. Mitchum's successor has not been named yet. Sources say BBDO plans to merge its BBDO/Slightly Fur-

(Continued on Page 8)

Lotus opens Pandora's box—P. 6

Apple makes huge bowl buy

By PATRICK MCGEEHAN

Apple Computer has resolved to start 1988 with a return to its old ways, by purchasing an unusual, all-day exclusive sponsorship of NBC-TV's Jan. 1 college bowl game telecasts.

The sponsorship, which makes Cupertino, Calif.-based Apple the only computer advertiser in the Fiesta, Rose and Orange bowls, is Apple's biggest one-day buy, costing about \$4 million.

For NBC, it is the largest sale of bowl-game inventory to a single sponsor.

In a deal reminiscent of the "event marketing" concept Apple used to introduce its Macintosh computer in 1984—which included the award-

winning "1984" commercial shown during the Super Bowl—Apple has purchased 22 30-second units in NBC's powerhouse New Year's Day lineup.

Apple's sponsorship also will receive mention on 10 "billboards"—short "brought to you by Apple" announcements during the games.

The company is considering running newspaper ads, including a page in *USA Today*, to draw attention to the buy, as it did with the "1984" spot.

Macintosh spots that have aired only on Sunday morning news shows will be included in the lineup, said Steve Grubbs, VP-director of national TV buying at BBDO Worldwide, New York.

"We have new creative and we

haven't had a chance to expose it a lot. We felt we needed to make a big push like this to reach the business target," he said.

The company has followed a broadcast strategy during the past year that limited buys to highly targeted programs, primarily Sunday morning shows and sports.

Mr. Grubbs said the spots would reach "somewhere around 45% of [U.S.] households... maybe more than the Super Bowl," on Jan. 1.

Apple sees the sponsorship package as a "morale-builder," said Steve Hayden, exec VP-senior creative director at BBDO, Los Angeles. "It shows that Apple is still a company that can pull off an event."

While the unusual buy marks a distinct change in Apple's TV strat-

egy this year, financial results for the fourth quarter are ahead of projections, sources said, freeing up additional ad dollars for 1988.

The new effort comes at a strategic time. Apple is losing its exclusive franchise in "desktop publishing," once the strongest argument for purchasing a Mac and a companion LaserWriter printer.

IBM Corp. and marketers of IBM-clones now offer similar packages.

Furthermore, IBM has been outspending the No. 2 Apple by as much as five to one. IBM is extending its "M*A*S*H reunion" campaign from personal computers to cover additional products, from typewriters to minicomputers.

In exchange for Apple buying out the remaining inventory in the three

games, NBC worked out trades to remove other computer advertisers, including IBM, from the Jan. 1 games. That enabled Apple to have computer exclusivity on NBC that day from 1:30 p.m. (ET) until the end of prime-time programming.

Arthur Watson, president of NBC Sports, said the arrangement of exclusivity over such a long stretch of airtime was "one of the few times it has ever been done."

The buy includes three spots during the Fiesta Bowl, which begins at 1:30 p.m.; three spots during the Rose Bowl pregame show; eight spots during the Rose Bowl; and eight spots during the Orange Bowl. #

Cleveland Horton in Los Angeles contributed to this story.

Highlights

NEWS

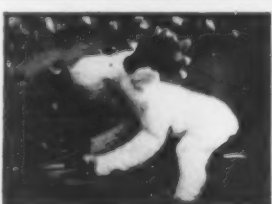
- 4 Serving 'tough client' Gallo**
Bet on it: Ernest and Julio Gallo will find an agency to succeed Hal Riney & Partners, which resigned the \$75 million account this month.
- 6 WPP buys hispanic shop**
After 18 months of negotiation, WPP Group has acquired the largest hispanic ad agency in the U.S., Mendoza, Dillon & Asociados.
- 14 Eveready, set, go**
Ralston Purina Co.'s Eveready division is giving the battery industry a jolt by segmenting the market with a new line.
- 15 China fights ad claims**
China has issued tough regulations to protect consumers and raise the standard of advertising.
- 16 Blau holds on to its belt**
Barry Blau & Partners will expand its business and remain independent through acquisitions.
- 17 AAF forms watchdog groups**
The American Advertising Federation is developing watchdog groups to track ad tax proposals in all 50 states.
- 32 Philly paper zones out**
The *Philadelphia Inquirer* is introducing more zoned inserts as suburban competition intensifies.
- 33 CBS wants drug advertising**
CBS-TV is forming an industrywide group to study how to open mass media to prescription drug advertising.
- 37 Local sales key for cable**
Many cable industry executives predict local spots would be cable's fastest-growing revenue source.

INTERNATIONAL

- 24 Salting the wound**
A potato chip battle is sizzling in Bonn, West Germany, where snack-foods marketer Bahlsens has been accused of running misleading ads, and may be forced to delay the European rollout of a low-fat chip.



Chevrolet startles Garfield with straightforward truck spots. Page 36.



Global gift-giving:
AA's International section takes a look at what's hot for the holidays around the world this year. In West Germany, consumers are falling in love with Sigikids, shown above; Aussies are flipping over The Great Australian Gambling Game; and the Irish are cheering up over the legalization of the drink poteem.

Departments

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Hoover ups ad spending

By JULIE LIESSE ERICKSON

Hoover Co. is picking up the tempo in the \$2 billion vacuum-cleaner industry with three new products and a \$12 million ad program set for the first half of 1988.

The campaign represents a 300% increase over the \$3 million Hoover spent on measured media advertising during the first half of 1987, and nearly five times the \$2.5 million spent during all of 1986, according to Leading National Advertisers.

Hoover, No. 1 with a 32% market share, will introduce its Innovation upright vacuums at the January Housewares Show in Chicago.

Two other undisclosed products will follow in early 1988.

In 1987, the North Canton, Ohio-based marketer introduced the Quik-Broom and Dubl-Duty, a battery-operated, hand-held vacuum.

Also this year Hoover broke a new multimedia campaign, tagged "Hoover keeps making it better," via Griswold Inc., Cleveland.

Additional commercials featuring the three new-product lines will



The Dubl-Duty vacuum takes on three children in this TV spot.

break in March and April, said Neal Davis, exec VP-client service for Griswold.

The 1988 media schedule includes the company's heaviest network TV schedule, with buys on early-morning and evening news, as well as prime-time sports news breaks; spot TV; consumer magazines; the Paul Harvey radio show; and local newspapers.

Hoover is trailed by Bloomington, Ill.-based Eureka Co., which claims a 25% market share, according to *Appliance Magazine*. #

Hart aches

Ad execs offer advice

By STEVE COLFORD

"Hi, I'm Gary Hart."

A line that might have worked as a vote-getter for the Democratic presidential aspirant now provokes snickers and jokes.

Even political image-makers are asking whether Mr. Hart, who re-entered the presidential race last week, can be taken seriously or will he require re-packaging?

"The first thing he ought to do is be born-again," said Jerry Franz, VP-account supervisor at Doremus Porter Novelli, a Washington public relations firm. "Then, in keeping with summit fever, he should hold a summit

with the Ayatollah."

Vic Kamber, president of the Kamber Group, Washington, suggested Hart commercials starring Donna Rice. "She at least could tell us how good he was," Mr. Kamber said.

Bob Gardner, president of Gardner Communications, San Francisco, suggested a retrospective

TV spot, featuring presidents such as Franklin Delano Roosevelt, Dwight D. Eisenhower and John F. Kennedy "and their mistresses."

"The ad could say that all these guys did a pretty good job governing despite their indiscretions, and I could be a good one, too." #

DIRECT MARKETING

Blau maps growth

Will expand, build presence to keep hold of independence

By JUDITH GRAHAM

Barry Blau & Partners, the nation's largest independent direct-response agency, is preparing to expand its business next year through acquisitions and joint ventures.

Blau's ambitious plans are designed to ensure its survival as an independent in a business increasingly dominated by direct-response subsidiaries of ad agencies. All the top 10 direct-response shops, except Blau, are owned by ad agencies.

Blau's immediate goals are to either acquire or form joint ventures with a computer data base company, telemarketing company, video production outfit and a TV direct-response agency. Officials said its acquisition budget is "flexible."

Discussions are under way with

CMSA, Downers Grove, Ill., a privately held computer data base company, and Harbor Associates, a Greenwich, Conn.-based TV production company working with Blau as its TV response arm.

In line with its conviction that advertising is a local business, Blau wants to build a presence in at least six major markets by acquiring or merging with local ad agencies, direct-response agencies or sales-promotion companies.

"The concept is regionalization," said Barry Blau, the firm's founder and chairman. The markets he wants to enter include Atlanta, Boston, Dallas, Los Angeles, Phoenix, Ariz., and Seattle.

So far, only one regional acquisition or merger is scheduled next year. Five to 10 are planned by

1990.

Blau also is evaluating the possibility of buying mail-order businesses. It operates a mail-order coin and collectibles business and sells a general-merchandise calendar through Bank of America, San Francisco, to its credit card customers.

Blau is offering acquisition candidates a chance to keep their identity but operate in the context of a larger organization, a source close to the firm said. "They're looking at entrepreneurial firms that want to cash out and are looking for a big brother, but not too big."

If all goes according to plan, Blau will grow to a \$250 million business in the next five years, or more than three times its current \$70 million in fees and commissions.

Top 10 direct-response agencies

Agency (parent)	'86 fees/commissions
1. Wunderman Worldwide (Young & Rubicam)	\$224.5 million
2. Ogilvy & Mather Direct (Ogilvy Group)	\$207.4 million
3. MARCOA Direct Advertising (Omnicom Group)	\$110.0 million
4. Grey Direct (Grey Advertising)	\$94.0 million
5. Kobs & Brady (Saatchi & Saatchi)	\$81.0 million
6. Chapman, Stone & Adler (Young & Rubicam)	\$80.4 million
7. Rapp & Collins (Rapp & Collins USA)	\$80.1 million
8. FCB Direct (Foote, Cone & Belding)	\$78.4 million
9. Barry Blau & Partners	\$63.1 million
10. McCann Direct (McCann-Erickson)	\$42.0 million

SOURCE: Direct Marketing Association

The company, which secured access to the public capital markets through an initial public offering in December 1985, will finance its growth through bank loans, private placements, a preferred stock offering or a debt offering.

Based on its asset base, Blau's financial advisers estimate it could borrow as much as \$15 million. But extra funds could become available, depending on the earnings of its acquired businesses.

Recent changes in the company's executive ranks permit Mr. Blau to

relinquish day-to-day operating responsibility and focus on acquisitions and new-business development.

The changes elevated Dennis Eastham, 40, former exec VP-general manager of the Chicago office, to president and chief operating officer. Ron Friedman, 39, former exec VP-general manager of Fairfield, Conn., and New York offices, became vice-chairman, a new post. Mr. Blau, former president, remains chairman and CEO. Altogether, Blau has added 16 staff members since January. #

WCRS broadens DM base

By JENNIFER PENDLETON

WCRS Group's purchase of San Francisco-based direct-marketing

agency Cohn & Wells gives the British company a foothold in the West Coast.

WCRS' deal is the latest in the merger trend that is reshaping the fast-growing field.

In recent years, almost all the major ad agencies either have set up direct-marketing units or bought independent shops specializing in direct marketing.

Most recently, Foote, Cone & Belding, Chicago, bought Los Angeles-based Krupp/Taylor.

Cohn & Wells Managing Partner Bradley Wells said his 3-year-old shop will operate autonomously, retaining its name and its 19-person staff.

WCRS is paying Mr. Wells, 45, and Martin Cohn, 41, the other part-

ner, \$3.2 million initially. It will make further payments up to \$14.8 million, depending upon future performance.

Both principals, who were formerly with Ogilvy & Mather, New York, have signed five-year contracts to continue with the agency.

"We will have complete day-to-day operational control," Mr. Wells said.

Among Cohn & Wells' principal clients are Bank of America, Pacific Bell and Gumps gift stores.

With annual billings of about \$20 million, Mr. Wells said he believes the shop is among the top 25 direct-marketing agencies in the U.S.

WCRS is the parent of New York agencies Della Femina, Travisano & Partners and HBM/Creamer. The company already has a direct-marketing unit at Della Femina. But Cohn & Wells will not work directly with that agency, although Mr. Wells said he believes its new sister shop will be a source of potential new-business referrals. #

HDM Direct taps Eaton

LOS ANGELES—Peter Eaton, 46, has been named senior VP-executive creative director, HDM Worldwide Direct, a new post. He was group creative supervisor, Wunderman Worldwide, New York.

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DECEMBER

	Current month		Year-to-date	
	1987	1986	1987	1986

— Art & antiques —

Art & Antiques (10X)	62.9	51.5	729.5	568.9
Art News (10X)	98.0	91.0	1,147.9	969.9
Southwest Art	64.3	85.7	1,013.1	906.8
Total Group	225.1	228.2	2,890.5	2,445.5
% change		-1.3%		18.2%

— Auto/cycle/rec. vehicles —

ATV Sports	44.0	49.0	512.2	661.2
Autoweek (52X)	140.4	139.0	1,826.0	1,653.8
Car & Driver	104.6	77.1	1,131.6	1,030.0
Car Collector & Car Classics	18.3	22.8	209.8	210.0
Car Craft	58.6	57.4	999.2	872.3
Cycle World	58.4	48.3	891.6	716.2
Cycle World	36.0	28.1	569.7	506.2
Dirt Rider	45.2	485.0	446.9	470.2
Dune Buggies & Hot VWs	71.0	75.3	906.6	1,032.2
Family Motor Coaching	149.0	129.3	1,865.6	1,716.0
4 Wheel & Off-Road	78.5	76.3	1,058.1	1,022.7
Four Wheeler	91.0	86.0	1,043.0	978.0
Hot Rod	58.6	39.4	876.2	724.5
Motorcyclist	23.1	16.5	524.5	495.9
Motor Trend	73.1	80.9	896.6	802.6
Motorhome	77.5	77.6	1,009.0	1,073.0
Rider	26.5	29.1	459.9	546.5
Road & Track	97.1	114.5	1,204.8	1,184.9
Trailblazer	44.2	30.5	576.1	453.0
Trailer Life	93.4	86.3	1,245.9	1,300.4
Total Group	1,388.4	1,748.4	18,253.2	17,448.7
% change		-20.6%		4.6%

— Boating & yachting —

Chesapeake Bay	31.8	27.5	548.9	464.5
Cruising World	108.9	91.8	1,502.6	1,535.5
Lakeand Boating (11X)	69.5	57.0	785.6	686.2
Motor Boating & Sailing	123.1	119.7	1,903.3	1,961.3
Sail	60.7	69.3	1,237.5	1,310.1
Small Boat Journal (6X)	39.0	38.7	307.0	287.9
Trailer Boats (11X)	—	—	571.0	446.9
Western Boatman (6X)	—	—	216.1	226.3
Yachting	111.6	106.4	1,679.8	1,631.0
Total Group	544.6	510.3	8,751.8	8,549.7
% change		6.7%		2.4%

— Canadian —

L'Actualite	83.7	94.4	987.5	1,027.0
Chateaux	—	—	—	—
English Edition A.	86.9	74.6	1,015.5	1,095.4
French Edition	77.2	72.5	914.3	947.6
City & Country Home (10X)	71.8	68.6	626.6	619.2
Equinox	—	—	250.1	236.0
Flare A.	103.0	58.9	1,062.1	964.4
Maclean's (52X) A.	97.0	146.0	1,412.6	1,610.8
Moneywise	38.5	47.4	409.2	438.3
Reader's Digest:	—	—	—	—
Canadian-English A.	57.4	65.8	692.6	877.8
Canadian-French A.	39.5	47.5	525.6	715.4
Toronto Life	177.4	145.6	1,274.4	1,208.3
Vancouver	107.5	117.2	881.2	960.7
Total Group	940.0	938.5	10,051.7	10,701.0
% change		0.2%		-6.1%

— Civic/fraternal —

American Legion	21.5	17.1	396.7	290.8
Elks (10X)	—	—	196.2	187.9
Kiwanis	—	—	179.5	181.3
Lion (10X)	—	—	83.8	64.6
Rotarian	14.6	13.3	180.4	177.5
VFW (11X)	29.0	31.5	349.0	286.6
Total Group	65.1	61.9	1,385.6	1,188.7
% change		5.2%		16.6%

— Comics —

Archie Comics Group	5.0	3.0	74.0	46.0
DC Comics	7.5	7.0	76.5	65.5
Marvel Comics Group	8.5	6.0	107.0	84.0
Total Group	21.0	16.0	257.5	195.5
% change		31.3%		31.7%

— General —

American Health (10X)	47.9	46.9	706.1	612.5
American Heritage (7X)	27.8	33.0	264.8	118.1
American World (6X)	—	—	213.2	234.2
The Atlantic A.	46.0	32.2	465.0	456.6
Bon Appetit A.	113.6	128.9	1,020.2	1,035.1
Changing Times	75.2	44.1	780.2	626.6
Condé Nast's Traveler	40.9	—	198.9	—
Connoisseur	101.5	74.6	994.7	889.8
Consumers Digest (6X)	—	—	145.3	173.2
Ebony	104.0	100.6	1,126.1	1,125.4
Fifty Plus	23.3	29.6	447.2	431.9
Food & Wine	96.0	89.7	753.1	686.6
Games (6X)	—	17.0	91.6	201.4
Golden Years	44.8	21.3	479.3	310.8
Gourmet	156.3	121.5	1,322.6	1,168.8
Harper's A.	26.9	21.4	363.0	268.8
Harrowsmith (6X)	—	—	289.0	237.0
Let's Live	42.0	42.0	545.0	589.0
Life	70.0	52.4	581.8	787.7
Mature Outlook	47.8	50.8	303.0	273.4
Modern Maturity (6X)	28.6	41.5	256.9	270.0
Money	146.4	145.2	1,563.9	1,490.0
Money Mailer	6.0	—	42.8	—
Mother Jones (9X)	14.3	18.2	151.4	190.0
National Geographic	180.4	26.5	242.3	277.0

	Current month		Year-to-date	
	1987	1986	1987	1986

National Geographic	—	—	—	—
Traveler (4X)	34.0	24.7	151.0	130.9
Natural History	31.7	34.8	423.2	484.8
Prevention	40.2	53.9	723.2	736.2
Psychology Today	27.9	25.9	360.9	354.8
Reader's Digest A.	120.4	121.6	1,181.4	1,178.8
Saturday Evening Post (9X)	30.8	29.5	356.5	336.2
Smithsonian	100.1	74.4	1,061.7	963.0
Town & Country	182.3	161.1	1,703.4	1,625.7
Travel-Holiday	35.7	40.5	611.8	518.8
Travel & Leisure	92.5	114.8	1,218.7	1,274.1
Vanity Fair	106.0	76.5	868.0	595.8
Writer's Digest	27.8	22.7	341.3	301.6
Yankee	68.1	72.7	963.6	931.7
Total Group	2,337.0	1,990.3	23,312.0	21,886.1
% change		17.4%		6.5%

— Home —

Americana (6X)	—	—	126.7	151.8
Architectural Digest A.	125.0	139.2	1,574.6	1,559.1
Better Homes & Gardens	142.6	119.5	1,422.9	1,333.0
Colonial Homes (6X)	59.3	71.4	385.3	387.3
Columbus Monthly-Homes (4X)	—	—	121.1	105.4
Country Home (6X)	78.3	63.3	356.1	294.5
Country Living	82.7	67.6	1,066.8	882.8
Family Handyman (10X) A.	41.6	41.1	561.0	575.1
Flower & Garden (6X)	41.7	38.0	253.7	228.6
Home	28.1	30.1	609.2	591.3
Home Mechanics	42.8	42.7	688.8	679.4
The Homeowner (10X)	23.4	18.1	348.8	300.3
Horticulture	42.5	33.4	441.7	425.2
House Beautiful	51.9	51.1	863.0	844.5
House & Garden	92.5	90.9	1,161.9	1,159.7
Houston Home & Garden	69.1	61.3	838.2	883.9
Metropolis	50.0	50.1	635.6	435.1
Metropolitan Home	61.4	46.2	801.5	679.1
1,001 Home Ideas	38.5	33.9	615.3	545.6
Organic Gardening	46.4	42.5	565.4	647.3
Phoenix Home/Garden	75.0	58.0	908.8	819.5
Practical Homeowner	—	—	426.1	467.7
San Diego Home/Garden	80.3	68.6	789.2	815.3
South Florida Home/Garden	44.4	30.8	514.8	381.1
Southern Accents (6X)	105.8	—	704.8	596.7
Southern Living	103.5	125.2	1,451.9	1,671.0
Sunset Magazine A.	109.9	116.9	1,476.0	1,620.6
Workbench (6X)	—	—	281.7	279.6
Total Group	1,649.0	1,439.8	19,992.9	19,360.3
% change		13.7%		3.3%

— In-flight & air passenger —

Aboard Group (7) (6X)	41.3	29.0	176.5	159.4
Alaska Airlines	54.8	45.5	654.5	689.3
America West Airlines	63.3	51.6	622.2	328.4
American Way (24X)	128.7	72.7	1,411.2	1,153.5
East/West Network:	—	—	—	—
Eastern Review	59.8	76.7	803.6	1,152.2
Northwest	41.3	34.5	533.8	547.7
PSA Magazine	60.2	79.2	973.5	1,105.1
Pan Am Clipper	53.0	38.7	555.8	523.2
Spirit	48.0	94.5	712.4	1,151.1
TWA Ambassador	50.8	56.5	609.5	165.0
Via A Vis	58.3	84.8	727.9	1,142.8
Halsey Publications:	—	—	—	—
Delta Sky	86.7	61.3	995.9	897.8
US Air	52.5	41.5	639.0	552.2
Piedmont Airlines' Pace	78.1	64.9	1,082.1	982.3
Spirit of Aloha (6X)	—	—	379.2	328.4
Total Group	876.7	831.4	10,877.1	10,878.3
% change		5.5%		0.0%

— Men's —

Esquire A.	140.2	156.3	1,155.8	1,246.0
Firehouse Magazine	44.2	40.2	550.9	542.1
Gentlemen's Quarterly A.	208.4	167.2	1,949.6	1,916.8
M Magazine	78.5	81.2	910.7	780.1
Muscle & Fitness	126.0	115.3	1,494.4	1,326.4
Penthouse A.	55.9	55.7	502.9	460.9
Playboy A.	61.5	61.8	662.7	721.5
Salute (8X)	—	25.8	215.9	142.4
Total Group	714.5	703.5	7,442.9	7,136.2
% change		1.6%		4.3%

— Metropolitan —

Aloha (6X)	37.4	39.8	188.8	180.3
Allanite	82.1	72.5	755.8	659.6
Baltimore	89.4	118.2	942.3	1,000.3
Boston	205.5	216.7	2,024.5	1,961.8
California	69.3	69.9	746.7	773.0
Chicago	142.3	154.2	1,322.9	1,640.1
Chicago's North Shore	111.2	129.1	1,061.8	1,057.3
Cincinnati	78.8	67.7	781.3	789.2
Cleveland	110.0	101.3	859.8	884.6
Columbus Monthly	78.5	87.1	879.6	866.2
Connecticut	106.3	101.5	1,215.9	1,137.4
D Magazine, Dallas/Ft. Worth	125.9	151.4	1,360.4	1,492.8
Denver	65.5	52.5	466.5	450.2
Detroit Monthly	160.3	94.1	1,134.7	975.0
Grand Rapids	43.8	36.8	516.7	481.4
Guthrie Life (10X)	71.0	69.0	837.0	745.0
Honolulu	84.2	69.7	883.0	777.0
Louisiana Life (6X)	—	—	238.3	248.9
Madison	76.0	77.0	768.9	780.0
Memphis	89.0	83.5	978.0	965.0
Miami/South Florida	93.0	81.0	727.8	793.4
Mid Atlantic Country	25.5	25.3	409.2	463.5
Minneapolis	101.2	92.0	789.8	825.6
Minneapolis/St. Paul	131.8	123.4	1,287.3	1,228.9

	Current month		Year-to-date	
	1987	1986	1987	1986

New England Monthly	66.5	59.4	567.5	500.8
New Jersey Monthly	94.0	76.1	1,140.2	960.3
New Mexico	39.5	35.8	397.7	336.1
Ohio	41.5	41.5	720.1	721.6
Oregon (6X)	27.0	—	259.0	—
Orlando	84.8	79.7	1,085.7	1,160.9
Palm Beach Life	102.8	107.3	786.3	765.9
Palm Springs Life	128.9	124.5	1,387.4	1,329.3
Philadelphia	168.1	174.5	1,820.0	1,663.0
Phoenix	69.9	98.3	800.5	1,163.3
Pittsburgh	78.2	75.2	843.3	821.7
St. Louis	102.2	75.7	708.1	618.7
San Diego	181.5	173.4	1,734.5	1,673.4
San Francisco Focus	129.6	121.2	1,249.3	1,181.0
Texas Monthly	167.3	146.8	1,271.2	1,496.5
Twin Cities	79.9	75.3	857.3	693.6
The Virginian (6X)	—	—	361.1	347.8
Washington (7X)	54.8	40.0	421.8	413.5
The Washingtonian	170.3	165.1	1,922.6	1,869.0
Total Group	3,964.5	3,783.4	39,510.5	38,832.7
% change		4.8%		1.7%